



VA TMS Domain Manager and Learning Manager Administrator Course

Session 3: Create and Configure Items and Curricula (Part 2 of 2)

Virtual Instructor-Led Training

Participant Guide

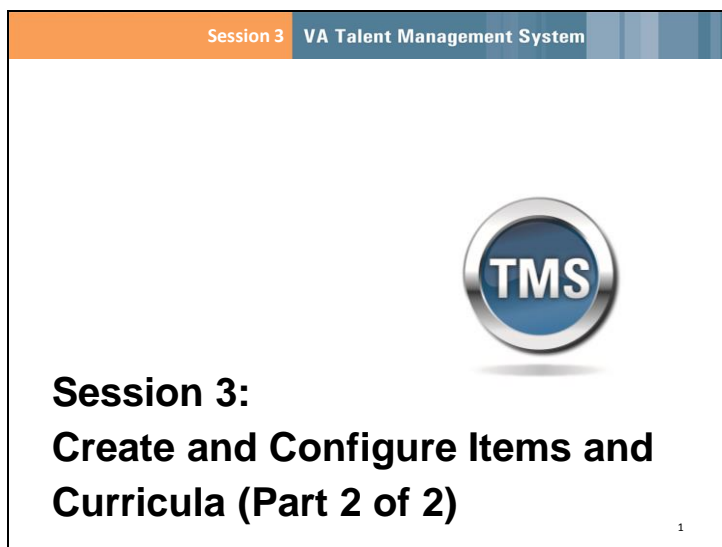
March 2014

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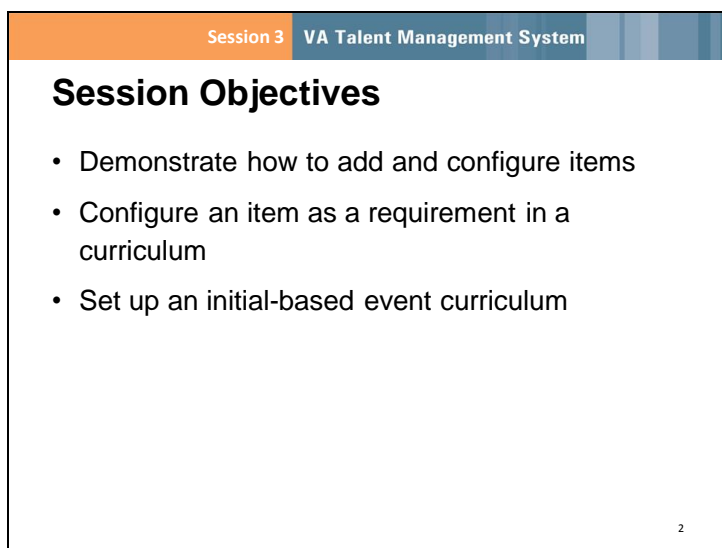
1.0 Training Content

1.1 Session 3 Overview



Notes:

Slide 1: Session 3: Create and Configure Items and Curricula (Part 2 of 2)



Notes:

Slide 2: Session Objectives

Notes:

Session 3

VA Talent Management System

Session 2 Review

- Lesson 1: Relationship of Items, Catalogs, and Curricula
 - Defined basic terminology (items, domain, item classifications)
 - Demonstrated how items are accessed and housed
 - Described types of items

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Slide 3: Session 2 Review

Session 3

VA Talent Management System

Session 2 Review (Continued)

- Lesson 2: Create and Configure an Item
 - Described the item key
 - Showed the different areas of an item record
- Lesson 3: Substitutes and Prerequisites
 - Defined substitute
 - Established a substitute relationship
 - Established a prerequisite relationship

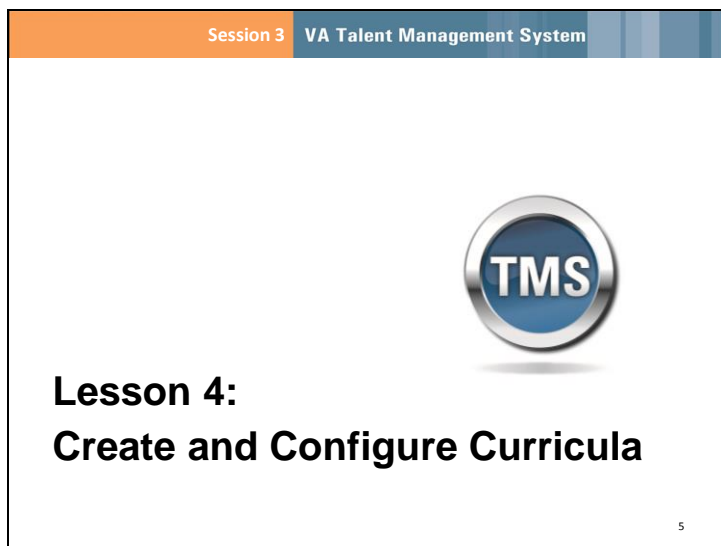
Questions about Session 2?

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Notes:

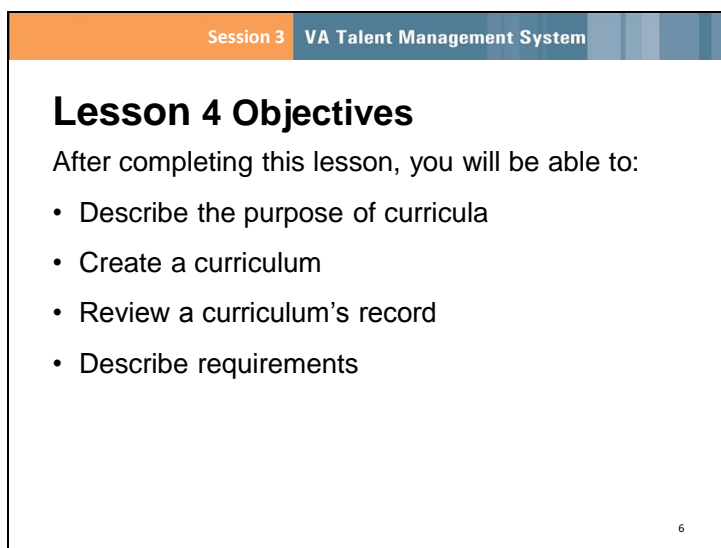
Slide 4: Session 2 Review (Continued)

1.2 Lesson 4: Create and Configure Curricula



Notes:

Slide 5: Lesson 4: Create and Configure Curricula



Notes:

Slide 6: Lesson 4 Objectives

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Curriculum

- A curriculum is a grouping of one or more items for the purpose of assignment and tracking as a single entity
- Curricula provide the functionality to recalculate required-by dates on items that have been completed but must be repeated on a recurring basis

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Notes:

Slide 7: Curriculum

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Grouping Items

Curriculum:

- Item A
- Item B
- Item C

Collectively known as

- **Curriculum 1**

User's To-Do List:

- Item A
- Item B
- Item C

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Notes:

Slide 8: Grouping Items

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Characteristics of Curricula

- Items can be used in one curriculum or multiple curricula with different date and requirement settings in each
- Modifications made to a curriculum have an immediate impact on all users who have the curriculum currently assigned
- Curricula can be linked to a job code or assigned with an assignment profile and are automatically assigned when a user is given that job code or meets the profile attributes
- Curriculum can contain requirements to complete
 - # of hours
 - # of hours from an item pool
 - # of items from an item pool

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Notes:

Slide 9: Characteristics of Curricula

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Curriculum Statuses

Curricula can have one of two statuses:

- Complete:
 - All items are complete
 - The effective date is in the future
 - Requirements have been met
- Incomplete:
 - Newly assigned curriculum with effective date in the past
 - Required items not complete
 - Retraining date has passed
 - Revisions have been made
 - Requirements have not been met

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Notes:

Slide 10: Curriculum Statuses

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Curriculum ID


- The Curriculum ID is a unique identifier in the VA TMS database
- The ID naming convention for curricula is:
LLL-XXXX (L=Location/Domain, X=Alpha character)

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Notes:

Slide 11: Curriculum ID

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Demonstration: Add a New Curriculum

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Notes:

Slide 12: Add a New Curriculum



Demonstration: Add a New Curriculum

To add new curriculum:

1. Navigate to **Learning > Curricula**.
2. Select **Add New**.

NOTE: You can also enter **Add Curriculum** into the **Search** field below the **Button** bar and select **Go**.

3. Enter a curriculum ID.
4. Enter a title for the curriculum.
5. Enter a description of the curriculum, if desired.
6. Leave the creation date set to the default.
7. Select a domain.
8. Select a curriculum type from the drop-down menu.
9. Leave the **Force Incomplete** checkbox unchecked.


NOTE: When you select the **Force Incomplete** checkbox, the system calculates whether the status should be complete or incomplete based on the user's latest attempt at completing the item. If the user's latest attempt is incomplete, the system calculates the expiration and required dates based on the date and time of the last unsuccessful attempt.

10. Select **Add**.

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Activity #1: Add a New Curriculum

System Practice



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Notes:

Slide 13: Activity #1: Add a New Curriculum



Activity #1: Add a New Curriculum

Use the two new items you created in the previous session and create a new curriculum called New Hire Orientation. Associate the two items to this curriculum.

1. Navigate to **Learning > Curricula**.

2. Select **Add New**.

NOTE: You can also enter **Add Curriculum** into the **Search** field below the **Button** bar and select **Go**.

3. Enter a curriculum ID.
4. Enter a title for the curriculum.
5. Enter a description of the curriculum, if desired.
6. Leave the creation date set to the default.
7. Select a domain.
8. Select a curriculum type from the drop-down menu.
9. Leave the **Force Incomplete** checkbox unchecked.

NOTE: When you select the **Force Incomplete** checkbox, the system calculates whether the status should be complete or incomplete based on the user's latest attempt at completing the item. If the user's latest attempt is incomplete, the system calculates the expiration and required dates based on the date and time of the last unsuccessful attempt.

10. Select **Add**.

Add items to a curriculum:

1. Using the curriculum created previously, select the **Contents** tab.
2. Select **Edit**.
3. Select the **Add Content** button.
4. Select **Items** from the drop-down menu.
5. Enter criteria in the keyword field to search for the items to include in the curriculum.
6. Select **Search**.
7. Check the **Add** checkbox next to each item to add to the curriculum.
8. Select **Add**. The selected item(s) is(are) added to the contents list.
9. Select the **Edit** link next to the last listed item:
 - a. Enter initial assignments.
 - b. Select an initial basis.

- c. Do not enter retraining assignments.
- d. Enter a basis date and an effective date.
- e. Select an assignment type.

10. Select **Apply Changes**.

11. Select the **Move Up** arrow and **Move Down** arrow to sequence the curriculum content.
This sets the suggested order display for users.

12. Select the **X** to close the **Edit** window and return to the curriculum record.

The sequence numbers only apply to group instances, which is a part of the TMS designed specifically for the Air Force. This is a function you would not use unless you were to create a group instance. This field sequences the order in which the items would be scheduled within the group instance. The group instance feature is very rarely used within the VA TMS.

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Curriculum Record

Once a curriculum record is added to the VA TMS, it is organized into functional areas.

Core Area

Recommended Next Wizard

Actions Area

Related Area

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Notes:

Slide 14: Curriculum Record

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Demonstration: Curriculum Record

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Notes:

Slide 15: Curriculum Record



Demonstration: Curriculum Record

Show the following sections on the three main areas of the curriculum record:

Core Area: The **Core** area contains the basic curriculum record information, including curriculum title, ID, description, and type. To edit a field in this area, select in a displayed field and enter text or select a reference value (depending on the field type). Once expanded, the screen displays the following sections where updates can be made:

- Title
- Description
- Summary
- Extended Summary (used by regulated organizations for CFR21 Part 11)

Related Area: The **Related** area of the curriculum record contains additional information regarding the curriculum. Select the **Related** tab on the left (i.e., Assignment Profiles) to display the details on the right.

Actions Area: The **Actions** area of the curriculum record contains links to additional actions that can be taken on the curriculum record, including:

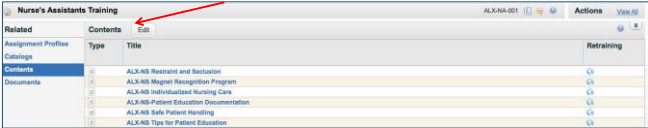
- Assign (initiates the batch assignment wizard)
- Send Notification (initiates the ad hoc notification wizard)
- Copy
- Delete

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Associating Contents

The Contents tab in the Related area is used to view, associate to the curriculum, and edit one or more of the following:

- Items
- Requirements
- Subcurricula



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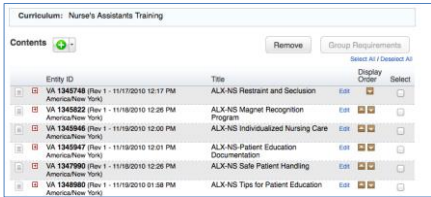
Notes:

Slide 16: Associating Contents

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Edit Curriculum

- As you add content, the system places it at the bottom of the list
- You can edit the sequencing of the content by clicking the Edit button



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Notes:

Slide 17: Edit Curriculum

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Items

- There is no limit to the number of items that may be added to a curriculum
- The following items are editable in an item:
 - Initial Assignment
 - Retraining Assignment
 - Basis Date
 - Effective Date
 - Assignment Type

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Notes:

Slide 18:Items

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Requirement-Based Curriculum

- Some trainings have requirements beyond a basic list that a user must accomplish to complete a curriculum
 - Hours at a specific activity
 - External training
 - Additional items from a selected list of items
- Requirements act like items in a curriculum
 - Can be assigned
 - Use retraining dates
 - Affect the curriculum status

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Notes:

Slide 19: Requirement-Based Curriculum

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Requirement Types

- # of Hours of specified hour type (any item, scheduled offering, or external event)
 - Total hours
 - Credit hours
 - Contact hours
 - CPE hours
- # Hours of specified hour type from pool of items (only from the defined pool of items)
 - Total hours
 - Credit hours
 - Contact hours
 - CPE hours
- Items from pool of items

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Notes:

Slide 20: Requirement Types

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Example Requirement

Requirement Type: # of Hours of specified hour type from pool of items

- Curriculum 1 has four items in it:
 - Ethics 101: 4 Credit Hours
 - Ethics 102: 3 Credit Hours
 - Ethics 103: 3 Credit Hours
 - Ethics 104: 2 Credit Hours
- REQUIREMENT: complete a total of six credit hours from curriculum

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Notes:

Slide 21: Example Requirement

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VA Talent Management System

Example Requirement

Requirement Type: # of Hours of specified hour type from pool of items

- Curriculum 1 has four items in it:
 - Ethics 101: 4 Credit Hours
 - Ethics 102: 3 Credit Hours
 - Ethics 103: 3 Credit Hours
 - Ethics 104: 2 Credit Hours
- REQUIREMENT: complete a total of six credit hours from curriculum

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Notes:

Slide 22: Example Requirement

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VA Talent Management System

Additional Requirement Options

To allow users to choose from two or more requirements and create an “OR” requirement, you can group requirements.

1. Add more than one requirement to the curriculum.
2. In the Contents section, select Edit.
3. Select the requirements you wish to group and click **Group Requirements**.

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Notes:

Slide 23: Additional Requirement Options

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Subcurricula

The Subcurricula option is used to create a hierarchical structure between two or more curricula.

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Notes:

Slide 24: Subcurricula

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Demonstration: Adding Requirements and Subcurricula

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Notes:

Slide 25: Demonstration: Adding Requirements and
Subcurricula



Demonstration: Adding Requirements and Subcurricula

Create a requirement:

1. Navigate to **Learning > Requirements**.
2. Select **Add New**.
3. Select **# Items from Pool of Items** from the **Requirement Type** drop-down menu.
4. Enter a requirement ID.
5. Enter a requirement description.
6. Select a domain ID.
7. Enter the creation date.
8. Leave the **Active** checkbox checked.
9. Enter any comments, as desired.
10. Select **Next**.
11. Enter the required number of items the user must complete from the pool.
12. Select the **add one or more** from list link.
13. Enter criteria to search for items to add to the requirement pool.
14. Select **Search**.
15. Check **Add** next to each item to add to the pool.
16. Select **Add**.
17. Verify the selected items are listed in the **Item Pool for Requirement** section.
18. Select **Add**.

Add a requirement to a curriculum:

1. Navigate to **Learning > Curricula**.
2. Enter criteria for the curriculum to which to add requirements.
3. Select **Search**.
4. Select **Curriculum ID** to which to add a requirement.
5. Select the **Contents** tab from the **Related** area.
6. Select **Edit**.
7. Select **Add Content**.
8. Select **Requirements** from the drop-down menu.
9. Enter criteria to search for the desired requirements.
10. Select **Search**.
11. Check **Add** next to each requirement to add.
12. Select **Add**. The new requirement is added to the bottom of the list on the **Curriculum Contents** tab.

13. To make the requirement required, select the **Edit** link and enter initial, retraining, and effective date information for each requirement. Setting an effective date makes the requirement “required.”
14. Select **Apply Changes**.
15. Optional: To group requirements: If more than one requirement is added to the curriculum, check **Select** next to the requirements to group.
16. Select **Group Requirements**.
17. Enter group description, initial training, retraining assignment information, and effective date.
18. Select **Create Group**.
19. The new requirement group is added to the bottom of the list on the **Curriculum Contents** tab.


Create a curriculum hierarchy (subcurriculum):

1. Using the curriculum created previously, select the **Contents** tab in the **Related** area.
2. Select **Edit**.
3. Select the **Add Content** button.
4. Select **Subcurricula** from the drop-down menu.
5. Enter criteria in the keyword field to search for the curriculum to add as the subcurricula.
6. Select **Search**.
7. Check the **Add** checkbox next to each curriculum to add as the subcurricula.
8. Select **Add**. The subcurricula are added to the bottom of the contents list.

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Activity #2: Adding Requirements and Subcurricula

System Practice



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Notes:

Slide 26: Activity #2: Adding Requirements and Subcurricula



Activity #2: Adding Requirements and Subcurricula

Create a requirement:

1. Navigate to **Learning > Requirements**.
2. Select **Add New**.
3. Select **# Items from Pool of Items** from the **Requirement Type** drop-down menu.
4. Enter a requirement ID.
5. Enter a requirement description.
6. Select a domain ID.
7. Enter the creation date.
8. Leave the **Active** checkbox checked.
9. Enter any comments, as desired.
10. Select **Next**.
11. Enter the required number of items the user must complete from the pool.
12. Select the **add one or more from list** link.
13. Enter criteria to search for items to add to the requirement pool.
14. Select **Search**.
15. Check **Add** next to each item to add to the pool.
16. Select **Add**.
17. Verify the selected items are listed in the **Item Pool for Requirement** section.
18. Select **Add**.

Add a requirement to a curriculum:

1. Navigate to **Learning > Curricula**.
2. Enter criteria for the curriculum to which to add requirements.
3. Select **Search**.
4. Select **Curriculum ID** to which to add a requirement.
5. Select the **Contents** tab from the **Related** area.
6. Select **Edit**.
7. Select **Add Content**.
8. Select **Requirements** from the drop-down menu.
9. Enter criteria to search for the desired requirements.
10. Select **Search**.

11. Check **Add** next to each requirement to add.
12. Select **Add**. The new requirement is added to the bottom of the list on the **Curriculum Contents** tab.
13. To make the requirement required, select the **Edit** link and enter initial, retraining, and effective date information for each requirement. Setting an effective date makes the requirement “required.”
14. Select **Apply Changes**.
15. Optional: To group requirements: If more than one requirement is added to the curriculum, check **Select** next to the requirements to group.
16. Select **Group Requirements**.
17. Enter group description, initial training, retraining assignment information, and effective date.
18. Select **Create Group**.
19. The new requirement group is added to the bottom of the list on the **Curriculum Contents** tab.

Create a curriculum hierarchy (subcurriculum):

1. Using the curriculum created in previously, select the **Contents** tab in the **Related** area.
2. Select **Edit**.
3. Select the **Add Content** button.
4. Select **Subcurricula** from the drop-down menu.
5. Enter criteria in the keyword field to search for the curriculum to add as the subcurricula.
6. Select **Search**.
7. Check the **Add** checkbox next to each curriculum to add as the subcurricula.
8. Select **Add**. The subcurricula are added to the bottom of the contents list.

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Documents Tab

On the Documents tab, you can:

- View the list of documents that are associated with the curriculum
- Add and delete documents from the list
- Determine whether the relationship between the corresponding version of the document and the curriculum needs to be verified

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Notes:

Slide 27: Documents Tab

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Demonstration: Documents Tab

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Notes:

Slide 28: Demonstration: Documents Tab



Demonstration: Documents Tab

The instructor will now show the location of the **Documents** tab.

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Knowledge Check

Select the statement that does NOT accurately describe VA TMS curricula.

- a) Curricula are primarily used to assign and track a group of items as a single unit.
- b) Modifications made to a curriculum have an immediate impact on all users who have the curriculum currently assigned.
- c) The curriculum's status is complete when some of the required items are complete and the remaining required items have an effective date in the future.
- d) The curriculum's status is incomplete when the effective date of each item is in the future.

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Notes:


Slide 29: Knowledge Check

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Knowledge Check

When editing an item's scheduling properties, which of the following sets the period or number of days that a user is allowed to complete the requirement?

- a) Initial assignment
- b) Retraining assignment
- c) Basis date
- d) Effective date
- e) Assignment type



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Notes:

Slide 30: Knowledge Check

1.3 Lesson 5: Initial Requirements and Retraining Requirements, Event-Based

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**Lesson 5:
Initial Requirements and
Retraining Requirements, Event-
Based**

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Notes:

Slide 31: Lesson 5: Initial Requirements and Retraining Requirements, Event-Based

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Lesson 5 Objectives

After completing this lesson, you will be able to:

- Discuss how the system counts periods and review
- Add an event-based initial requirement to items in a curriculum
- Add a retraining requirement to items in a curriculum

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Notes:

Slide 32: Lesson 5 Objectives

Session 3 VA Talent Management System

Period-Based Curricula

- A set amount of time in which the user must complete the training
- There are different periods and requirements that can be required of the user for completion

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Notes:

Slide 33: Period-Based Curricula

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Retraining

- Items that must be repeated on recurring intervals will have a Retraining assignment
- Once the item is complete and recorded, it is flagged as complete
- The next Required-By date will be calculated by the Retraining assignment

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Notes:


Slide 34: Retraining

Session 3 VA Talent Management System

Item Settings

Each item in a curriculum has the following settings:

- Initial Assignment
- Retraining Assignment
- Effective Date
- Assignment Type



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Notes:

Slide 35: Item Settings

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Effective Date

- A user must complete a required item before the effective date to avoid a curriculum status of Incomplete
- If an effective date is in the future, it will not affect the overall completion status of the curriculum
- Effective dates only affect Incomplete and Complete curricula status and do not change required dates

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Notes:

Slide 36: Effective Date

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Assignment Type

The assignment type is a status assigned to an item that indicates the level of importance to the user, such as:

- Required
- Optional
- Recommended

A user must complete all required items to obtain a Complete curriculum status.

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Notes:

Slide 37: Assignment Type

Session 3 VA Talent Management System

Event vs. Calendar Basis

Admins have two options available when setting initial and retraining assignments:

- Event Basis: Hire date or assignment date only
- Calendar Basis: A particular date on the calendar

Note: You will see Calendar Basis on your screen, but the VA does not use Calendar Basis requirements.

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Notes:

Slide 38: Event vs. Calendar Basis

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Event Basis

Using event basis, the TMS calculates the required date by completing the current period and then adding the initial/retraining assignment.

Triggers for required date calculation to begin:

- Assignment Date (initial assignment)
- Learning History completion date (retraining basis event)

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Notes:

Slide 39: Event Basis

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Period Start Date

Always remember:

- The system has to complete the current period (day, month, year, quarter) before it can begin counting a new one

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Notes:

Slide 40: Period Start Date

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Configuring Retraining Assignments

- The VA TMS calculates the required-by date upon completion of the initial item and the period
- The number of times it will occur will depend on the retraining number

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Notes:

Slide 41: Configuring Retraining Assignments

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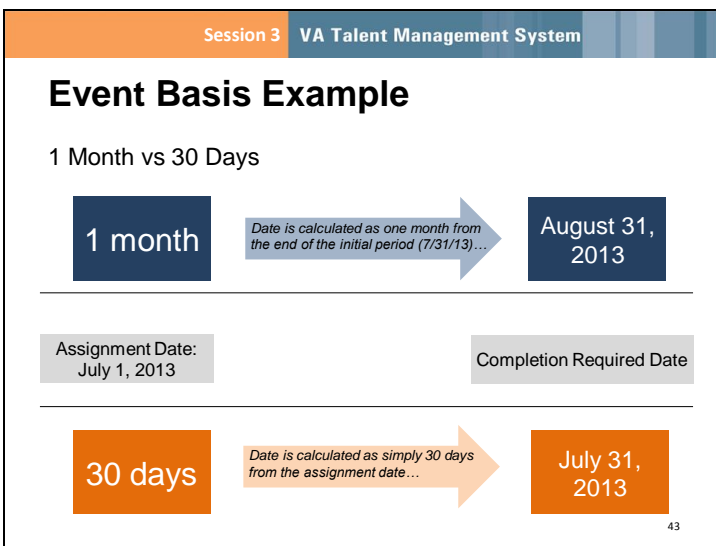
Required Dates Practice

Assignment	Date Period	Number	Due Date
03/15/2013	Years	1	12/31/2014
03/15/2013	Days	365	03/15/2013
03/15/2013	Months	6	09/30/2013
03/15/2013	Days	183	09/15/2013
03/15/2013	Quarters	1	06/30/2013
03/15/2013	Months	3	06/30/2013
03/15/2013	Days	90	06/15/2013

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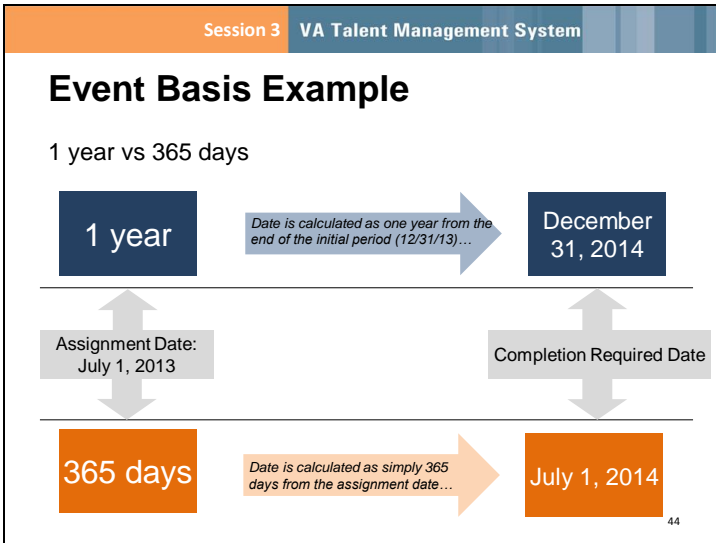
Notes:

Slide 42: Required Dates Practice



Notes:

Slide 43: Event Basis Example



Notes:

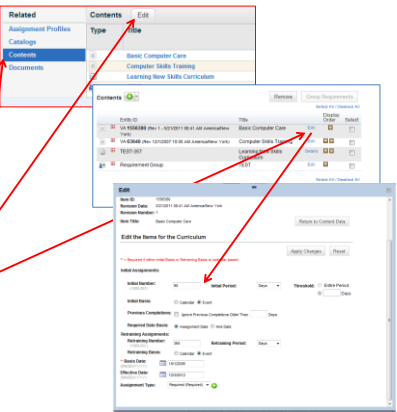
Slide 44: Event Basis Example

Session 3 VA Talent Management System

Setting and Editing Initial and Retraining Dates

Remember **CCEE**:

- C** Curriculum - navigate to the Curriculum record
- C** Contents - select Contents from the Related area
- E** Edit - click the Edit button
- E** Edit - select the Edit link for the Item you want to set Required Dates for



The screenshot shows the 'Contents' tab selected in the 'Related' area. The 'Edit' form is open, displaying fields for 'Initial Date', 'Retraining Date', and 'Effective Date'. Red arrows point from the 'CCEE' mnemonic to the corresponding steps in the interface: 'C' to the Curriculum record, 'C' to the Contents tab, 'E' to the Edit button, and 'E' to the Edit link for the item.

Notes:

Slide 45: Setting and Editing Initial and Retraining Dates

Session 3 VA Talent Management System



Demonstration: Setting Required-By Dates in a Curriculum

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Notes:

Slide 46: Demonstration: Setting Required-By Dates in a Curriculum



Demonstration: Setting Required-By Dates in a Curriculum


For this demonstration, the instructor will find a curriculum, copy it to make it his or her own, and set dates.

1. Search for and find a curriculum and select **Contents** from the **Related** area of the record.
2. Select the **Edit** button (do not select the item title; this will navigate you to the item entity).
3. Locate the item to modify and select the **Edit** link.
4. In the **Initial Assignments** section, enter an initial number.
5. Select **days** as initial period.
6. Select **event** as initial basis.
7. In the **Retraining Assignments** section, enter a retraining number.
8. Select **days** as the retraining period.

Session 3 VA Talent Management System

Activity #3: Setting Required-By Dates within a Curriculum

System Practice



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Notes:

Slide 47: Activity #3: Setting Required-By Dates within a Curriculum



Activity #3: Setting Required-By Dates within a Curriculum


1. Search for and find a curriculum and select **Contents** from the **Related** area of the record.
2. Select the **Edit** button (do not select the item title; this will navigate you to the item entity).
3. Locate the item to modify and select the **Edit** link.
4. In the **Initial Assignments** section, enter an initial number.
5. Select **days** as initial period.
6. Select **event** as initial basis.
7. In the **Retraining Assignments** section, enter a retraining number.
8. Select **days** as the retraining period.

Session 3 VA Talent Management System

Knowledge Check

There are three types of requirements. Which of the following is NOT a requirement type? (Select all that apply.)

- a) # Hours of specified Hour Type
- b) # Hours of specified Item Type
- c) # Hours of specified Hour Type from Pool of Items
- d) # Items from Pool of Catalogs
- e) # Items from Pool of Items



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Notes:


Slide 48: Knowledge Check

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Knowledge Check

True or False: If a user needs to complete an item on a recurring basis, you can forgo placing the item in a curriculum and just have a retraining period assigned.

- a) True
- b) False



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Notes:


Slide 49: Knowledge Check

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Knowledge Check

The assignment type is a status assigned to an item that indicates the level of importance to a user. Which of the following is NOT a VA TMS assignment type?

- a) Alternative
- b) Required
- c) Recommended
- d) Optional



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Notes:

Slide 50: Knowledge Check

Session 3 VA Talent Management System

Session 3 Summary

- Demonstrate how to add and configure items
- Configure an item as a requirement in a curriculum
- Set up an initial-based event curriculum

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Notes:

Slide 51: Session 3 Summary

Session 3 VA Talent Management System

Session 4 Preview

- Title: Create and Configure Online Learning
- Lessons:
 1. Online Content Overview
 2. Online Content and Packages
 3. Items with Online Content

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Notes:

Slide 52: Session 4 Preview

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Questions?



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Notes:

Slide 53: Questions?